

CLAIMS

What is claimed is:

1. A method for formulating a stock Portfolio comprising the steps of :

establishing a database of a multiplicity of stocks;

applying preset parameters for filtering said stocks to form an Autoportfolio
of selected stocks;

weighting each of said preset parameters that are applied to each of said
selected stocks for generating a Rating for each stock of said Autoportfolio;

applying said weighted parameters including said Rating to said stocks of said
Autoportfolio for establishing limits for issuing a BUY order for a selected stock
when the preset parameters for purchase are met;

purchasing a predetermined number of the selected stocks which meet the
preset parameters to establish a Portfolio;

1 setting a limit, related to said limits for issuing a BUY order, for selling a

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3 purchased stock from said Portfolio and for issuing a SELL order when said limit for
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5 selling is met; and

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7 selling said purchased stock from said Portfolio and purchasing another stock

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9 which meets said preset parameters.

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12 2. A method as in Claim 1, wherein said step of establishing a database includes
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14 obtaining said database on a daily basis .

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17 3. A method as in Claim 1, wherein the step of weighting employs the
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19 parameters of (S1) earnings growth rate past 3 years; (S2) earnings growth rate
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21 current year; (S3) earnings growth rate estimate next year; (S4) earnings growth last
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23 quarter compared to same quarter 1 year ago; (S5) P/E, estimated; (S6) P/E Growth,
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25 current; (S7) P/E Growth, estimated; (S8) sales growth past 12 months; (S9)

1 difference between sales growth rate from the previous 3 years to the last year;

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3 (S10) price momentum; (S11) capitalization; (S12) debt; (S13) dividend; and (S14)

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5 Rating.

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8 4. A system for formulating a stock Portfolio comprising :

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10 a database of a multiplicity of stocks;

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12 means for applying preset parameters to filter said stocks, thereby forming

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14 an Autoportfolio of selected stocks;

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16 means for weighting each of said preset parameters that are applied to each of

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18 said selected stocks for generating a Rating for each stock of said Autoportfolio;

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20 means for applying said weighted parameters including said Rating to said

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22 stocks of said Autoportfolio for establishing limits for issuing a BUY order for a

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24 selected stock when the preset parameters for purchase are met;

1 means for purchasing a predetermined number of the selected stocks which

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3 meet the preset parameters to establish a Portfolio;

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5 means for setting a limit, related to said limits for issuing a BUY order, for
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7 selling a purchased stock from said Portfolio and for issuing a SELL order when

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9 said limit for selling is met; and

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11 means for selling said purchased stock from said Portfolio and purchasing
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13 another stock which meets said preset parameters.

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17 5. A system as in Claim 4, wherein said means for applying preset parameters

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19 comprises selected ones of the parameters of S1) earnings growth rate past 3 years;

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21 (S2) earnings growth rate current year; (S3) earnings growth rate estimate next year;

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23 (S4) earnings growth last quarter compared to same quarter 1 year ago; (S5) P/E,

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25 estimated; (S6) P/E Growth, current; (S7) P/E Growth, estimated; (S8) sales growth

1 past 12 months; (S9) difference between sales growth rate from the previous 3 years
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3 to the last year; (S10) price momentum; (S11) capitalization; (S12) debt; (S13)
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5 dividend; and (S14) Rating.
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